

I-SMART Client File Development

Assessment Only

The following are I-SMART modules commonly used to construct a client file. This shows a client file with both assessment and admission steps.

- If the user is not documenting an assessment prior to admission, skip steps 5-10.
 - Always perform a search for clients prior to adding a new client to insure that person does not already have a file in the system.
 - If the client is already in the system and has a closed case, clicking on the client's Activity List link will take the user to the Episode List screen. At that screen, simply begin with step 3 below.
 - If documenting an assessment/placement screening with no admission within the succeeding 30 days, do steps 1-10.
1. **Add New Client:** If the client has never been seen in agency before current episode, this will begin client's Case #1. If the client has been seen in the agency before and has a closed case file, click the client's Activity List link on the search screen and skip to step #3.
 2. **Client Profile**
 3. **Start New Episode:** Located on the Episode List screen
 4. **Intake**
 5. **Consents** and **Referrals Based on Consents** can be done at any time once the client has both completed Client Profile and Intake Info screens in the system.
 6. **Assessments: TAP** (If completed, this will populate much of the Placement Screening module)
 7. **Placement Screening** (When complete, this will populate much of the Admission module)
 8. **Program Enrollment** (Assessment): Suggestion – For assessments only, put in both start and end dates along with Termination Reason (Assessment Completed)
 9. **Encounter Note(s):** Event Type: Placement Screening/OWI
 10. **Close Case:** If the client has an assessment, but will not be admitted for treatment or has not returned for 30 days after the assessment, the case should be closed by clicking the **Save and Close the Case** link on the Intake screen. Should the client then return, start a new case (Episode of Care) by going to the client's Episode List and **Start New Episode**. This will create Case #2.